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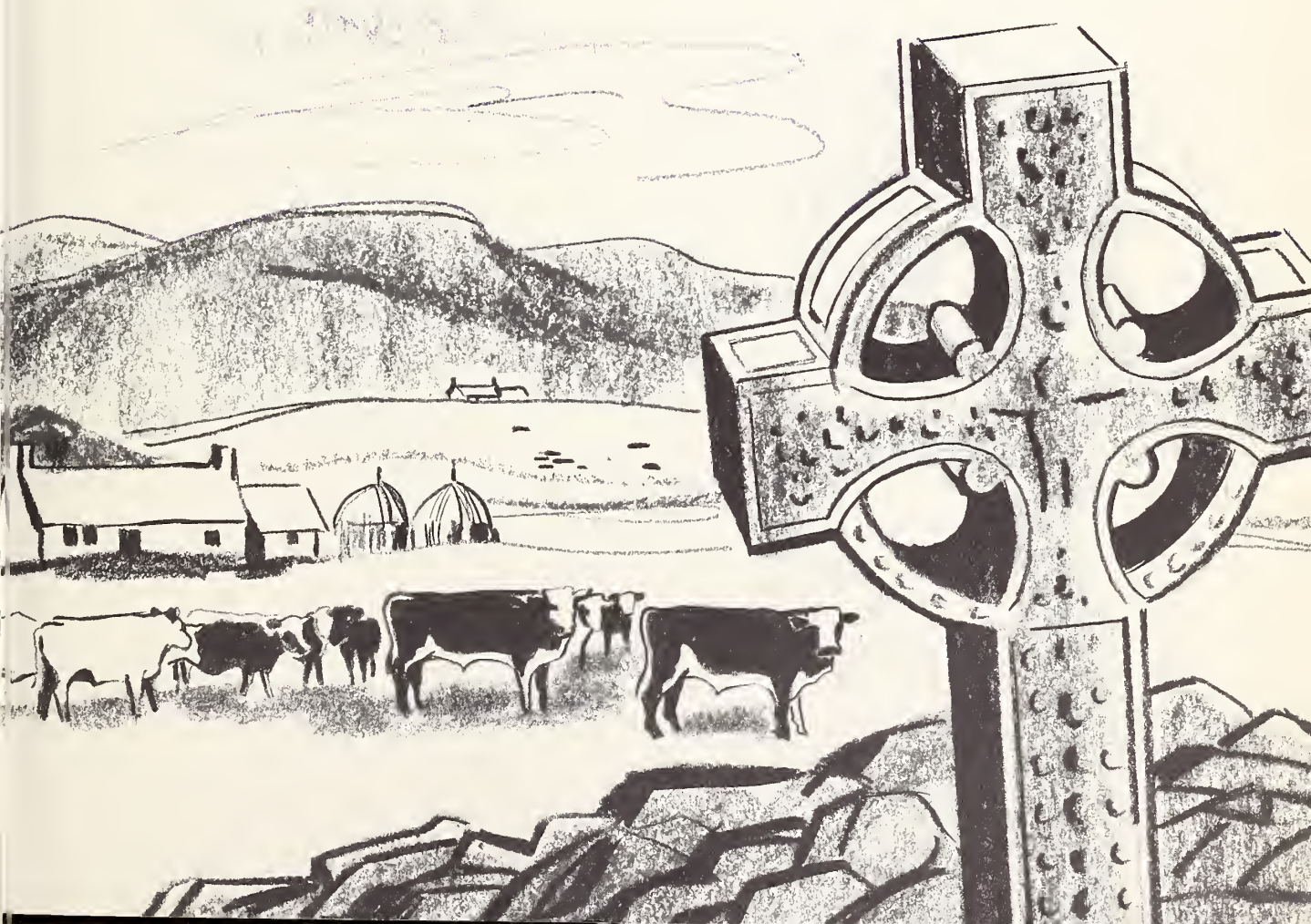
# ireland's LIVESTOCK and MEAT INDUSTRY

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## FOREWORD

Ireland has a long-established export trade in livestock and meat products. The United Kingdom is its major foreign market, but it also has for some time been an important supplier of manufacturing-type beef to the United States.

This study of the Irish livestock industry is one of a series designed to help keep people in the livestock industry and in government informed of developments in livestock and meat exporting countries. It supersedes FAS M-130, published under the same title in March 1962.

The current study was prepared following the author's visit to Ireland in 1968. He wishes to express his thanks to the numerous Irish government and industry officials who assisted him, especially J. F. Wallis, Principal Officer, Livestock and Meat Trade Division, Department of Agriculture and Fisheries, Dublin. A word of thanks also goes to Eugene T. Ransom, Agricultural Attaché, and his staff, American Embassy, Dublin, for their valuable assistance.

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# Ireland's Livestock and Meat Industry

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## INTRODUCTION

The Republic of Ireland—home of some 2.9 million people—comprises 26 counties covering an area of 27,000 square miles, about half the size of the State of Wisconsin. It is bounded on the east by the Irish Sea and St. George's Channel, on the south and west by the Atlantic Ocean, and on the north by Northern Ireland and the Atlantic Ocean.

Ireland's topography resembles a basin, with hilly and mountainous regions 2,000 to 3,000 feet in elevation bordering low-lying, rolling plains of bog, pasture, and farmland.

The climate is mild and free of extremes. Although rain and dampness are commonly associated with Irish climate, the country occasionally experiences prolonged periods of dry weather. Winters are usually free of severe frost. Temperatures generally range between 35° F. in winter and 75° F. in summer. Rainfall, more constant on the western coast than in the eastern sections, averages about 42 inches annually and is heavier and more frequent than in Western Europe.

Agriculture, forestry, and fishing account for only about 19 percent of Ireland's net national product at factor costs. However, as is true of many rural-oriented economies, agriculture is Ireland's mainstay. Livestock and meat products account for about 75 percent of total farm output, with cattle and pigs the most important farm animals. Milk, dairy products, and beef are the leading products, although live cattle and some bacon also make important contributions to foreign exchange earnings.

Traditionally, farm youth who have not found profitable employment on farms have migrated to cities and to foreign countries. The pattern has been for one member of the family to remain on the farm and assume ownership. With young people leaving the farms, farmers tend to be advanced in age and very conservative in business dealings. They place little trust in banks and consider debts, even loans for production prerequisites, a plague to be avoided at all possible costs. Perhaps this is sound fiscal policy for many individual farmers, but it is a yoke around the neck of the Irish economy because it is blocking more rapid increases in farm production.

## LIVESTOCK

Livestock raising is the most important farm activity in Ireland. It accounts for about 75 percent of agricultural output and employs 90 percent of the rural work force. Exports of livestock and meat products account for approximately 40 percent of the nation's foreign exchange earnings.

Ireland's total work force, according to the 1966 census, was 1,055,957. Farm workers were the largest group, with 31 percent of the total. Manufacturing industries employed 19 percent and commerce 14 percent. However, the number of people employed in agriculture has been declining. A net total of 45,900 left agriculture between 1961 and 1966. Estimates from other sources indicate that this trend in migration away from the farm is continuing.

Migration away from the farm does not necessarily imply a corresponding decline in the importance of agriculture or the livestock industry in the national economy. Structural changes, perhaps significant ones, are occurring in agriculture. Reportedly, many small farms under 30 acres have been consolidated into larger holdings. These small farms are declining in numbers, while the number of farms with 50 to 100 acres is increasing. However, these structural changes have not yet resulted in significant increases in agricultural output. This may be partly a result of the continuing large migration of people from all occupations, mainly to the United Kingdom. This emigration has reduced pressure on the land and diminished the need for increased production for both the rural and urban populations.

## Livestock numbers

**Cattle.**—Cattle numbers were estimated at 5,150,000 head as of January 1, 1967, an increase of nearly 20 percent over the 1961-65 average (table 1). Numbers were abnormally high at the beginning of 1967 because of lower culling and slaughter rates in late 1966. Cattle for slaughter held over in late 1966 were marketed early in 1967. This was reflected in a lower inventory of 5,030,000 head in early 1968. Cattle numbers were estimated at 5,086,000 head as of January 1, 1969.

Table 1.—IRELAND: Livestock numbers, average 1961-65, annual 1963-69<sup>1</sup>

Year	Cattle	Sheep	Hogs
Average:	<i>1,000 head</i>	<i>1,000 head</i>	<i>1,000 head</i>
1961-65 . . . . .	4,320	3,316	1,042
Annual:			
1963 . . . . .	4,301	3,333	1,014
1964 . . . . .	4,369	3,386	1,013
1965 . . . . .	4,524	3,456	1,158
1966 . . . . .	4,946	3,464	1,101
1967 . . . . .	5,150	3,059	921
1968 <sup>2</sup> . . . . .	5,030	2,990	1,017
1969 <sup>3</sup> . . . . .	5,086	2,852	1,062

<sup>1</sup> January census.  
mouth precautions.

<sup>2</sup> Census delayed 1 month in 1968 because of foot-and-  
<sup>3</sup> Preliminary.

Source: Irish Ministry of Agriculture.

Most of the cattle slaughtered for beef are crossbred from dairy cows and beef bulls. Approximately 90 percent of the cows kept for breeding purposes are dairy cows.

For dairy stock the most popular breeds are Shorthorn and Friesian. Other breeds include relatively small numbers of Jersey, Ayrshire, and Kerry. At one time the Shorthorn was by far the most popular breed, but with payments for milk the primary source of income, the Friesian has been rapidly overtaking the Shorthorn in popularity. If artificial insemination records are a true indication, the Friesian has already surpassed the Shorthorn. In 1967 a total of 317,747 inseminations were of semen from Friesian bulls compared with only 147,314 from Shorthorns. There were 300,521 inseminations from the Hereford breed; most likely many of these inseminations were to produce crossbred calves from Shorthorn and Friesian cows. Semen from Hereford, Friesian, and Shorthorn breeds accounted for about 98 percent of the recorded artificial inseminations in 1967.

The most prominent beef breeds are the Hereford, Aberdeen Angus, and Charolais. The Hereford breed, in particular, is of considerable importance for crossbreeding with dairy cows to produce beef. Aberdeen Angus, relatively small in number, apparently are not used to any appreciable extent for crossbreeding. Charolais, also few in number, are gaining an increasing amount of interest, mainly as purebred beef cattle whose offspring would be potentially salable in foreign markets.

Cattle are kept for milk and beef in all 26 counties of Ireland, with the heaviest concentration in the south and central sections. Calves for beef production, which originate largely from dairy herds, change hands a number of times and often are moved from dairy farms to initial grazing areas and finally to fattening areas prior to final marketing in Ireland as store (feeder) cattle destined for the United Kingdom or slaughter as fat cattle to produce beef for export to the U.K. Most of the beef required by the domestic market comes from heifers not needed for replacement stock, while cull cows are boned-out for export, primarily to the United States.

**Hogs.**—Hog numbers have fluctuated around 1 million head in recent years (table 1). Total numbers were estimated at 1,062,000 on January 1, 1969, compared with 1,017,000 in early 1968. The Irish Government permits only two breeds in Ireland, Landrace and Large White. The two breeds are about equal in popularity. The Irish Large White was developed from the Yorkshire and has been in Ireland for many years. The Landrace was introduced into



Ireland only about 12 years ago and has been very well accepted by Irish farmers. Progeny testing aimed at producing the larger, leaner hogs in demand in both the domestic and foreign markets is being carried on by the Agriculture Institute near Cork.

As is true with cattle, hogs are produced in most of Ireland. The largest numbers are in the main barley-producing regions of Cork, Waterford, and Carlow counties. Another important area includes Cavan and Monaghan counties in the northern part of the country.

**Sheep.**—In the early 1960's sheep numbers fluctuated around 3.3 million head. Although Ireland's conditions are well suited for sheep production, the trend in numbers since 1965 is slightly downward (table 1).

The majority of the sheep can be termed crossbred. The purpose of crossbreeding is to produce fat lambs. Nevertheless, the major breeds are broadly classified as long-wool breeds, short-wool breeds, and mountain or hill breeds. The long-wool breeds include the Galway and Border Leicester; the short-wool breeds include the Suffolk, Oxford Down, and Shropshire; and the mountain breeds consist primarily of the Wicklow and Black-Face. For fat lamb production, ewes from these breeds are usually crossed with rams of Suffolk, Oxford, or Border Leicester.

As is true with young cattle, lambs are moved from area to area for fattening prior to final marketing and slaughter.

## Production practices

Ireland has mild winters and adequate rainfall to produce good pastures for an extended grazing season during spring, summer, and early autumn months. Beef animals and sheep are fed only a maintenance ration (usually hay) and some roots in the winter months and grass-fattened for an extended period beginning in early spring. There is little intensive farming on beef and sheep farms, and even on dairy farms cattle are raised largely on grassland.

Movement of young stock from the farms where they were born to initial grazing areas and later to fattening areas is an integral part of grassland farming. Although the total transportation and marketing costs appear to be excessive (see section on marketing practices), it is cheaper to move the animals to where the feed is rather than to harvest and move the feed to the animals.

Most of the beef cattle destined for slaughter originate on dairy farms. Dairy farmers sell their male calves at an early age. Consequently, these calves generally change hands a number of times before they are finally sold as stores for export or fat steers for slaughter. Dairy farmers tend to keep a fair number of heifer calves until they are old enough for selection as replacement stock. However, the first culls are generally sold prior to the onset of the first winter. Therefore, even heifers destined for slaughter are marketed for the first time at a young age.

Male calves that are sold soon after birth may be resold to a third owner for the first wintering, to a fourth owner for initial grazing as a yearling, to a fifth owner for the second wintering, and to a sixth owner for fattening the following spring. Transportation costs, plus selling and handling charges, add up to an appreciable percentage of the value of a store or slaughter animal (see section on marketing practices).

Swine production is mainly a small-scale operation on farms that also produce other commodities. The average number of sows kept per farm is only about three and many farmers keep only one or two. Two out of every three pigs farrowed are finished on farms other than those where they were farrowed.

Swine production is based on feeding barley. Until about 7 years ago, potatoes were an important swine food, especially in western Ireland. In recent years, however, swine feeding has tended strongly toward the use of grains, and in 1965 Irish farmers began using imported grain sorghum for finishing hogs. A large percentage of the grain sorghum used is imported from the United States.

Corn (maize) is not considered acceptable in Ireland as a feed for finishing hogs due to its higher carbohydrate and oil content. Corn is used for sow and baby pig rations. Oats, wheat offals, soybean meal, and fish meal are also important swine feeds. Most of the soybean meal is imported from the United States. Skim milk was once an important hog feed, but most of it is now manufactured into nonfat dry milk, primarily for export. The loss of this inexpensive feed has been a factor in limiting the growth of the swine industry. Feed grains are relatively expensive.

Irish pigs are generally fed on full feed until they reach about 100 pounds, liveweight. A system of restricted feeding is then introduced until market weight is attained. The average market weight for bacon hogs is 190 to 200 pounds, while those killed for fresh pork weigh somewhat less.

Because of the use of lower energy barley and the system of restricted feeding, the feed-conversion ratio for hogs is fairly high by international standards. The feed-pork ratio is about 4 to 1. As a result of this poor conversion ratio, Irish hogs are not generally marketed much before 24 to 26 weeks of age and even then are fairly light in weight.

Irish farmers strive to farrow two litters a year from their brood sows, but on the average each sow farrows only one and one-half litters per year. There is no seasonal farrowing pattern, partly because of the generally mild climate throughout the year. The average number of pigs weaned per litter is about eight.

Housing used for hogs varies considerably. On larger farms, housing is usually standardized to some extent by the use of one of the following types—Danish, Solari, McGuckian, or Jordan. However, on smaller farms the housing for hogs often is not adequate for Ireland's damp, if mild, climate.

Sheep are kept primarily as lamb and mutton producers, but wool makes a substantial contribution to farm and export sales. Sheep are well suited to Irish farming conditions. They require no expensive housing and do not make excessive demands on labor. They can thrive in mountainous areas totally inaccessible to other stock and utilize herbage, such as heather, that will not support other stock. The fact that sheep are kept largely in the mountainous areas, except when lambs are being grass fattened, accounts for the relatively low level of sheep and lamb production in Ireland. Many farmers in the better grassland districts believe that sheep are hard on the land and that cattle will not thrive if sheep are run with them.

## Diseases

Ireland is relatively free of livestock diseases, especially foot-and-mouth and rinderpest. The most costly diseases affecting Irish livestock in recent years have been tuberculosis and brucellosis. The Ministry of Agriculture has been highly successful with a campaign to eradicate tuberculosis from cattle. Although the incidence of this disease is now very low, control programs are enforced rigorously to insure that it will never again be a major problem.

With the success of the tuberculosis eradication program as an impetus, the Ministry of Agriculture has initiated a program to eradicate brucellosis in cattle. This disease will likely prove more difficult to eradicate than tuberculosis. However, strict enforcement of control measures similar to those used to eradicate tuberculosis from farm herds, such as testing animals for the disease, slaughtering of reactors, and preventing carrier animals from moving into disease-free areas, will be employed. The main differences are that vaccines for brucellosis are not equally effective and the disease is more easily transmitted from one farm or one area to another. The Ministry of Agriculture recently announced a ban on the use of live S.19 vaccine for brucellosis on any bovine animal, even calves. Vaccination with a newly developed killed vaccine, S.45/20, is recommended for bovine animals.

## Land values, taxes, wages

Farmland values naturally vary according to location, fertility of the soil, and production potential. They generally are highest in the Midlands and lowest in the West. Sales reported in the first half of 1968 included a 250-acre farm in the Midlands for \$576 per acre, 45 acres in the South for \$387 per acre, and 22 acres in the West for \$338 per acre. The range in price for 12 farms was from \$165 to \$576 per acre. One can conclude from these transactions that the market value of farm land in Ireland is very near that of comparable farmland in the United States.

Land taxes are imposed by the municipal authorities and are judicially collected. Income taxes are a different story. Reportedly, Irish farmers pay little or no taxes on agricultural income.

The rural work force as of June 1967 included 254,000 farmers and relatives, 32,000 permanent paid workers, and 24,000 temporary paid workers. According to the Agriculture Wage Board, the minimum agricultural wage rate for the Midlands and South was \$23.64 per 50-hour week. The minimum rate for the West was \$22.80 per week. Reportedly, the top wage paid permanent workers was about \$28.00 per week. These wage rates compare favorably with salaries of nonfarm labor.



## Marketing practices

Livestock marketing is under the auspices of the Ministry of Agriculture, which maintains offices at selling centers for the purpose of market reporting, inspection, and the compilation of records. Producers sell livestock to local dealers, packers, butchers, or through private or cooperative auction sales yards. In recent years, auction sales by cooperatives have become one of the most important market outlets for cattle and sheep.

**Cattle.**—Costs of marketing cattle do not appear to be excessive on an individual sales basis. However, many animals are traded as many as four or five times before they are ultimately sold as stores for export or fat cattle for slaughter. Transportation charges to and from the market and selling fees for cattle changing hands five times are estimated to total more than \$20.00 per head. About 60 percent of this cost is for transporting the cattle to and from the market. It is estimated that another \$20.00 or more per head is required to pay all the transport and marketing charges for export store cattle from the time they are purchased in Ireland until they are ultimately delivered to a slaughter plant in the United Kingdom (after being fattened by a British farmer).

In order to reduce substantially the costs of marketing cattle in Ireland, more farmers would have to raise or purchase calves to produce their own stores or fat cattle. In most instances this would necessitate considerable purchases of grains and other feedstuffs, particularly for wintering cattle. Since grains and other livestock feeds are expensive in Ireland, the present system of selling calves and stores to farmers who at least have the hay or pastures for wintering and/or fattening cattle is the best system from an economic point of view. However, considerable potential production is lost simply because most farmers winter cattle on a minimum maintenance ration.

**Hogs.**—Irish bacon factories are required by government regulations to purchase slaughter hogs on a carcass-weight basis. Slaughter hogs may be sold by producers directly to bacon factories, to agents or representatives of bacon factories, or to dealers who purchase hogs for resale to bacon factories. Slightly more than half of all the slaughter hogs are sold directly to bacon factories or their agents; the remainder are sold through local fairs and auctions.

## Livestock prices

Prices of livestock, particularly cattle, vary considerably during the year (table 2). Fat steers averaged about 20.1 cents per pound, live weight, during April 1968, compared with 17.5 cents in December of that year. The highest prices prevail in the spring, when lush pastures are available for fattening cattle. Normally, cattle prices begin to decline in June and July, when increasing numbers of fat cattle are marketed for slaughter. Later in the year, farmers continue to sell increasing numbers of cattle, including cull cows, after they have made maximum use of their pastures. The price declines generally continue into November and December. In 1968 cattle prices did not decline significantly until August, and then the drop was relatively less than normal. This market strength was attributed to the U.K. ban on South American meat in the early months of 1968.

**Lambs** normally are not marketed before April. Early lambs bring a premium price (table 2). The seasonal trend in lamb prices, at least from May to November, is similar to that in cattle prices. Due to shortages in supply, lamb prices begin rising in November.

Prices of adult sheep reveal less seasonal trend than either cattle or lamb prices (table 2). Mutton is apparently a low-priced meat item, irrespective of any seasonal variation in available supplies.

Prices for bacon hogs show little seasonal trend. This is only partly because the supply of bacon hogs on the market is more even throughout the year than that of either cattle or lambs. The main reason is that the government has established minimum prices for bacon-type hogs.

Table 2.—IRELAND: Livestock prices, liveweight, monthly and annual average, 1966-68

Item	Jan.	Feb.	March	April	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Annual average
	Cents per pound	Cents per pound	Cents per pound	Cents per pound	Cents per pound	Cents per pound	Cents per pound	Cents per pound	Cents per pound	Cents per pound	Cents per pound	Cents per pound	Cents per pound
Store bullocks: <sup>1</sup>													
1966 .....	18.46	19.15	21.18	21.44	21.59	20.63	18.53	16.65	16.06	15.25	14.03	14.88	18.25
1967 .....	16.28	17.68	19.28	20.13	19.13	17.46	16.94	16.90	17.15	16.96	17.69	15.85	17.85
1968 .....	16.90	17.63	19.53	20.12	19.82	19.42	19.39	18.64	18.54	18.29	17.78	17.54	18.63
Fat cattle:													
1966 .....	18.71	19.13	20.80	21.65	22.28	20.96	19.28	17.40	16.40	15.41	15.00	15.16	18.50
1967 .....	16.88	18.06	19.59	20.31	19.78	18.47	17.31	17.59	18.00	17.56	18.28	16.45	18.19
1968 .....	18.29	18.80	19.55	19.98	19.82	19.18	19.07	18.24	18.03	17.76	17.33	17.22	18.61
Fat cows:													
1966 .....	14.03	13.47	14.75	15.78	16.22	16.75	15.00	13.91	13.16	12.22	11.78	12.28	13.91
1967 .....	13.06	14.44	15.16	14.66	14.78	13.81	12.31	12.44	13.00	12.50	13.16	12.40	13.72
1968 .....	(3)	15.00	14.66	15.00	14.79	14.68	14.79	14.57	15.00	15.32	14.46	14.79	14.81
Fat lambs:													
1966 .....	(2)	(2)	(2)	33.91	29.84	25.13	21.19	19.71	18.59	18.56	19.00	19.63	21.16
1967 .....	(2)	(2)	(2)	29.81	26.03	22.44	(3)	20.59	20.41	20.56	21.66	20.62	(3)
1968 .....	(2)	(2)	(2)	35.97	32.88	27.31	(3)	(3)	(3)	(3)	(3)	(3)	(3)
Fat ewes:													
1966 .....	(3)	(3)	(3)	(3)	(3)	(3)	8.22	7.28	7.06	7.50	8.09	8.66	9.06
1967 .....	(3)	(3)	(3)	(3)	(3)	(3)	(3)	8.06	8.38	8.59	10.22	11.14	(3)
1968 .....	(3)	(3)	(3)	(3)	(3)	(3)	(3)	(3)	(3)	(3)	(3)	(3)	(3)
Bacon pigs: <sup>4</sup>													
1966 .....	30.43	30.50	30.53	30.63	31.03	31.61	31.81	32.06	32.15	32.21	32.56	32.65	31.53
1967 .....	32.31	32.28	32.31	32.72	33.50	34.00	33.25	32.69	32.84	32.78	32.63	28.30	32.84
1968 .....	28.39	28.42	28.61	28.58	28.71	29.17	29.43	29.54	29.44	29.17	29.78	29.70	29.11

<sup>1</sup> Steers, 784 to 896 pounds, excluding Dublin prices.<sup>2</sup> No quotations; lambs not marketed before early April.<sup>3</sup> Not available.<sup>4</sup> Prices for bacon pigs are on a deadweight basis.

## MEAT AND MEAT PRODUCTS

### Production policies

The Irish Government has two main subsidy programs aimed at increasing meat production. These are the Fat Cattle and Lamb Subsidy Program and the Bacon and Pig Amendment Act of 1939. From January 1964 through June 1969 the government operated a Calf-Heifer Subsidy Program providing \$36.00 for each calved heifer added to the farmer's basic cow herd.

### Fat cattle and lambs

The subsidy program is an extension of the U.K. Guaranteed Price, or Deficiency Payment Scheme, under the terms of the Anglo-Irish Area Agreement. In 1966, the U.K. Government extended its deficiency payments to the first 25,000 long tons (56 million lb.) of beef and 5,500 tons (12.3 million lb.) of lamb of specified qualities exported to the United Kingdom during each fatstock marketing year. After experimenting with various supplemental fatstock subsidy payment schemes, the Irish Government decided to finance identical payments for these products exported to the United Kingdom in excess of 25,000 and 5,500 tons, respectively. These payments are limited to steers weighing a minimum of 730 pounds with a dressing percentage of 54 percent; and to lambs with a minimum live weight of 55 pounds.

In return for these concessions granted by the U.K. Government, the Irish Government agreed that it would do its best to ensure annual exports to the United Kingdom of at least 638,000 Irish feeder cattle, 25,000 tons of beef, and 5,500 tons of lamb of specified qualities. Irish feeder cattle and lambs imported into the United Kingdom become eligible for deficiency payments after being in the country for 2 months.

The Pig and Bacon Amendment Act of 1939 established the Pig and Bacon Commission with wide powers over the pig industry. The Commission, reconstituted in its present form in 1961, includes a chairman, three processor representatives, two producer representatives, and an officer of the Department of Agriculture and Fisheries. The day-to-day functions of the Commission are carried out by a general manager and his professional staff.

The overall objectives of the Commission are to increase production and stabilize prices. The Commission operates the government's price support program for bacon-type hogs. It purchases pork in accordance with the guaranteed minimum prices established by the government. Exports are sold at the best price attainable in international markets. Losses incurred on exports by the Commission are financed by a levy on slaughter hogs and by an annual grant from the government.

The Commission has a number of other responsibilities and programs. It operates an insurance plan to cover losses (from death, injury, and condemnation of carcasses on veterinarian examination) on hogs purchased by bacon factories. It also operates a sow distribution program.

### Slaughterhouse facilities, inspection, grading

Local butchers generally have their own facilities for slaughtering cattle and sheep to supply the domestic market for beef, veal, lamb, and mutton. There are about 1,300 butchers who slaughter some 200,000 cattle and 1 million sheep annually for the domestic market. The scale of operations varies considerably, but the average butcher kills about three head of cattle and 15 sheep per week.

The plants that export meat also vary in size and scale of operation. In 1968 there were 60 packing plants licensed to export meat, of which 11 were authorized to export to the United States. Only 25 of these engaged in exports on a regular basis, and five were responsible for 80 percent of total exports. Thus, the five large plants slaughter about 500,000 head of cattle and 560,000 sheep annually, while the remaining 55 export plants slaughter only 120,000 cattle and 140,000 sheep.

In 1968 there were 38 bacon factories, of which two were authorized to export to the United States. Bacon factories in most instances are located on the same premises as slaughterhouses that export meat and are operated jointly with them. Bacon factories which slaughter for the domestic market are subject to the same regulations as those that slaughter for export.



Slaughterhouse operations—including local butchers, plants that export meat, and bacon factories—are administered primarily by local authorities under the general supervision of the Ministry of Agriculture. Each local authority is empowered to make bylaws for the licensing and registration of all slaughterhouses in its area and to make laws regulating the sale of meats pursuant to the area's inspection laws.

The slaughter of animals for export is authorized only at slaughterhouses registered by the Ministry of Agriculture under the Agricultural Produce Acts or licensed under the Pig and Bacon Act. Before a license is granted, slaughterhouse premises must comply with certain stipulations as to structure, equipment, sanitation, etc., as set by the Ministry of Agriculture. All animals slaughtered at these slaughterhouses are subject to examinations by veterinary officers of the Ministry, both before and after slaughter. Meat inspection in all areas is performed by veterinary inspectors, sometimes assisted by trained lay inspectors.

Ireland does not have official grades for beef, lamb, or mutton. Beef and lamb carcasses for export that are eligible for the British-Irish Government deficiency payment must meet certain minimum standards. Other than this, there are no established grades for these meats.

Pigs, on the other hand, must be graded if they weigh between 127 and 168 pounds, deadweight. The grade is determined by the back fat measurements, the quality of the carcass, and in the case of the A Special, A, and B1 Grades, the length measurements of the carcass. Exports are restricted to the two top grades which are the only grades that qualify for subsidy. There are 10 grades in the 127- to 168-pound weight group. About 65 to 70 percent of the hogs slaughtered in this weight group fall into the top two grades.

## Slaughter trends

Cattle slaughter in 1967 was estimated at 954,000 head (table 3). This was an increase of 335,000 head from the 1966 level and 389,000 from the 1961-65 average. The larger slaughter in 1967 is attributed primarily to two factors: (1) It included a substantial number of cull cows carried over from the 1966 season; and (2) more fat cattle were slaughtered in Ireland for the export of beef to the United Kingdom, while live cattle exports declined.

Cattle were marketed in a more normal pattern in 1968 except that competition between the British and Irish farmers for Irish store cattle was increasingly keen. This tended to restrict the supply of live cattle available for export and added to the supply available for slaughter in Ireland. Nevertheless, the total number of cattle slaughtered declined in 1968 to 815,000 head, which was 196,000 head more than in 1966.

Sheep and lamb slaughter was at a relatively high level during the 1963-66 period but declined by 189,000 head in 1967 (table 3). Slaughter during 1968 declined by another 55,000 head.

Hog slaughter has varied considerably from year to year (table 3). The number slaughtered declined in both 1966 and 1967, but almost regained the 1966 level in 1968.

Table 3.—IRELAND: Livestock slaughter, average 1961-65, annual 1963-68

Year	Cattle and calves	Sheep and lambs	Hogs
Average:	<i>1,000 head</i>	<i>1,000 head</i>	<i>1,000 head</i>
1961-65 . . . . .	565	1,754	1,716
Annual:			
1963 . . . . .	604	1,912	1,678
1964 . . . . .	491	1,849	1,707
1965 . . . . .	492	1,753	1,949
1966 . . . . .	619	1,944	1,793
1967 . . . . .	954	1,755	1,560
1968 <sup>1</sup> . . . . .	815	1,700	1,760

<sup>1</sup> Estimates by Office of U.S. Agricultural Attaché.

Source: Irish Ministry of Agriculture.

## Meat output, consumption

**Beef and veal.**—Output of beef and veal has fluctuated drastically from year to year although the trend is upward (table 4). In 1963 about 284 million pounds were produced. Output declined to less than 250 million pounds in both 1964 and 1965 but increased to 298 million in 1966. In 1967 it climbed to a record of 475 million pounds.

The increase in beef and veal production in 1967 was attributed to a large carryover of slaughter cattle, primarily cull cows, from the 1966 season and a decline in exports of live cattle (stores) to the United Kingdom in 1967. Consequently, supplies of both cow beef and fat-carcass beef were substantially larger in 1967.

Total beef and veal output declined by 81 million pounds in 1968 even though production of beef from fat cattle for export to the United Kingdom increased. The increased output of beef for the U.K. market resulted from the foot-and-mouth disease outbreak there and the temporary ban on U.K. imports from South America.

The guaranteed price program for beef (from fat cattle) exported to the United Kingdom was largely responsible for the increase in production of beef from fat cattle in 1967. In 1968 the competition at Irish livestock sales between Irish and British buyers of store cattle was keen. With grazing conditions excellent in Ireland during the first half of 1968, many steers exported to the United Kingdom were forward or fat stores. Nevertheless, a relatively large number of fat cattle were slaughtered in Ireland, and the beef was exported to the United Kingdom.

**Mutton and lamb.**—Production of mutton and lamb has varied from year to year without any clear trend (table 4). However, the extension of the U.K. Deficiency Payment Scheme for lambs of specified qualities may have forestalled a downward trend in production. Also, these export payments have encouraged the slaughter of lambs for the shipment of carcass lamb to the United Kingdom at the expense of live lamb exports.

**Pork.**—Total pork production (including bacon) also has varied considerably in past years (table 4). However, a downward trend began in 1966 when output declined by more than 9 percent. A similar decline occurred in 1967. Preliminary estimates indicate that pork output recovered to the 1966 level in 1968. Relatively high feed prices and farmers' reluctance to use available credit facilities are the major obstacles to increasing hog production. Most hog farmers keep only one or two sows (see section on production practices).

**Consumption.**—Ireland consumes about 45 percent of its annual production of red meats. The Irish population consumes more pork than any other type of meat (table 5). Beef is the second most popular meat, but mutton and lamb are also popular. On the average, the Irish eat about 56 pounds of pork, 30 pounds of beef and veal, and 24 pounds of mutton and lamb per capita annually (table 6).

Ireland ranks sixteenth in total per capita consumption of red meats. Uruguay, the leading country, has a per capita consumption of red meats twice that of Ireland. The average American consumes about 60 percent more red meats than the average Irishman.

Table 4.—IRELAND: Meat production, average 1961-65, annual 1963-67

Year	Beef and veal	Pork	Mutton and lamb
Average:	<i>Million pounds</i>	<i>Million pounds</i>	<i>Million pounds</i>
1961-65 . . . . .	274	262	99
Annual:			
1963 . . . . .	284	254	106
1964 . . . . .	249	265	103
1965 . . . . .	249	306	99
1966 . . . . .	298	277	107
1967 . . . . .	475	250	95

Source: Irish Ministry of Agriculture.

Table 5.—IRELAND: Meat consumption, average 1961-65, annual 1963-68

Year	Beef and veal	Pork	Mutton and lamb	Total red meats
Average: 1961-65 . . . . .	<i>Million pounds</i> 86	<i>Million pounds</i> 158	<i>Million pounds</i> 69	<i>Million pounds</i> 313
Annual:				
1963 . . . . .	88	151	71	310
1964 . . . . .	95	165	70	330
1965 . . . . .	96	181	67	344
1966 . . . . .	95	170	68	333
1967 . . . . .	79	164	71	314
1968 . . . . .	76	169	69	314

Source: Irish Ministry of Agriculture.

Table 6.—IRELAND: Meat per capita consumption, average 1961-65, annual 1963-68

Year	Beef and veal	Pork	Mutton and lamb	Total red meats
Average: 1961-65 . . . . .	<i>Pounds</i> 30	<i>Pounds</i> 56	<i>Pounds</i> 24	<i>Pounds</i> 110
Annual:				
1963 . . . . .	31	53	25	109
1964 . . . . .	33	58	24	115
1965 . . . . .	34	63	24	121
1966 . . . . .	33	59	24	116
1967 . . . . .	27	57	24	108
1968 . . . . .	26	58	24	108

Source: Irish Ministry of Agriculture.

## Meat Products

**Wool.**—Wool is an important foreign exchange earner even though sheep are kept primarily for mutton and lamb and there has been little effort to produce fine-quality wool. Wool production totaled about 22 million pounds in 1968, compared with 23.4 million in 1967, and 25.7 million in 1966. The 5-year average for 1961-65 was 25.0 million pounds.

**Tallow and lard.**—Rendering plants in Ireland produce about 40 million pounds of tallow annually. Lard production is about 8 million pounds per year.

## POTENTIAL FOR INCREASED PRODUCTION

Ireland has excellent climatic conditions for production of livestock, particularly cattle and sheep. Rainfall is adequate and well distributed over the growing season. The winter months are not too severe. However, the major factor limiting the production of cattle and sheep is inadequate feed supplies during the winter months.

Consequently, Ireland's potential to increase livestock production, under present management practices, is dependent upon the potential for expanding pastures and increasing production of hay or other fodder. Pastures and hay production are being expanded, and farmers are also utilizing this production to greater advantage by conserving more hay for the winter months. Undoubtedly, there is room for an appreciable, steady increase in livestock production by utilizing available domestic sources of feed (primarily pastures and hay). However, Ireland has a substantially greater potential to increase livestock production by importing and utilizing feed grains.



In order to change their production practices, most Irish farmers would have to invest a relatively large sum of money and possibly incur substantial debts, which they dislike. The required investments would be primarily for feed grains, although most farmers believe that considerable funds would be required for buildings to house their animals. Dry feedlots with a minimum of shelter most likely would be adequate for cattle.

However, a complete switch to grain fattening would not be required to greatly enhance Ireland's potential to increase beef production. Considerable potential beef production is lost because cattle are fed only a maintenance ration during the winter months. The feeding of more grain and other feed supplements during the winter months to keep them gaining weight would result in more efficient utilization of pastures.

Obviously, Ireland has the potential to produce much more mutton and lamb. Many authorities believe that it would be possible to substantially increase the production of mutton and lamb before this increase resulted in the utilization of resources necessary for other livestock. In many areas, farmers could add a few head of sheep without significantly reducing the carrying capacity of their pastures for cattle.

The major factor limiting hog production from the standpoint of resources is feed supplies. Domestic feed grains are in short supply and relatively expensive. Also, the bacon-type hog produced in Ireland is not an efficient convertor of grain into meat. Therefore, the end product, bacon, is a relatively expensive product and is exported in competition with Danish bacon.

## FOREIGN TRADE

### Exports and imports

Ireland is primarily an exporter of livestock and meat products. Imports of red meat and meat products are banned for veterinary and animal health reasons. Imports of breeding animals are permitted under strict quarantine procedures. Also, a few slaughter animals are imported from Northern Ireland. Imports of some items such as wool and hides and skins are also permitted.

Ireland's major export market is the United Kingdom. This trade is facilitated by a trade agreement which dates back to 1938. The agreement assures Ireland duty-free entry or preferential rates in the British market. Ireland in turn gives preferential duty rates to British goods entering the Irish market.

Ireland is a member of the General Agreement on Tariffs and Trade (GATT).

**Live animals.**—During 1968 Ireland exported 625,000 cattle, 161,000 sheep, and 800 hogs (table 7). Cattle exports were 45,500 less than in 1967, but still slightly above the 1966 level. Exports of sheep were 20,800 more than in 1966 but 50 percent of the number shipped in 1964. Hog exports in 1968 were down sharply from the 1967 level.

The United Kingdom is Ireland's major market for live animals. Both cattle and sheep exported to the United Kingdom are primarily feeder animals. British buyers who fatten their animals for a minimum of two months qualify for the fatstock guaranteed price upon sale of the animals for slaughter.

Live cattle exported to other countries, primarily European Community (EC) countries, are mainly slaughter animals. Variable levies imposed by the EC have reduced this trade substantially in recent years.

The relatively small exports of hogs to a number of countries are primarily purebred animals for breeding purposes.

**Beef and veal.**—Exports of beef and veal were 270.5 million pounds, product weight, in 1968, compared with 335.9 million pounds in 1967 (table 8). The relatively large exports in 1967 resulted primarily from the holdover of slaughter animals from the 1966 season for marketing in 1967. This resulted in a sharp increase in exports of boneless cow beef to the United States. Also, with the guaranteed price as an incentive, more fat cattle were slaughtered for the export of beef to the United Kingdom.

The final destination or utilization of Irish beef in recent years has been largely predestined by type. Heifer beef, which is from lighter weight and lower priced animals, is sold almost exclusively on the domestic market. Apparently, about 75 percent of the cow meat is shipped to the United States, almost all that meets the specifications of U.S. buyers. Some boneless cow beef is used for canning, while the balance is exported to the United Kingdom and a few other European countries.

Table 7.—IRELAND: Exports of live animals, annual 1963-68

Commodity and country	1963	1964	1965	1966	1967	1968
<b>Cattle:</b>	<i>1,000 head</i>	<i>1,000 head</i>	<i>1,000 head</i>	<i>1,000 head</i>	<i>1,000 head</i>	<i>1,000 head</i>
United Kingdom . . . . .	641.8	703.9	514.4	562.1	649.5	617.6
United Arab Republic . .	—	—	—	9.3	—	—
EC countries . . . . .	16.8	80.5	81.0	49.2	21.1	7.7
Morocco . . . . .	—	2.2	—	—	—	—
Switzerland . . . . .	1.0	3.2	.9	.8	—	—
Germany, East . . . . .	—	.4	.5	.4	—	—
Other countries . . . . .	1.6	—	—	—	.3	.1
<b>Total . . . . .</b>	<b>661.2</b>	<b>790.2</b>	<b>596.8</b>	<b>621.8</b>	<b>670.9</b>	<b>625.4</b>
<b>Sheep:</b>						
United Kingdom . . . . .	311.6	285.4	206.0	165.2	129.9	<sup>1</sup> 116.8
France . . . . .	—	—	—	7.2	—	4.3
Other countries . . . . .	17.7	28.1	26.6	8.3	10.5	<sup>2</sup> 40.1
<b>Total . . . . .</b>	<b>329.3</b>	<b>313.5</b>	<b>232.6</b>	<b>180.7</b>	<b>140.4</b>	<b>161.2</b>
<b>Hogs:</b>						
United Kingdom . . . . .	1.3	1.2	—	1.2	—	<sup>1</sup> .8
Other countries . . . . .	2.0	3.4	4.7	—	—	—
<b>Total . . . . .</b>	<b>3.3</b>	<b>4.6</b>	<b>4.7</b>	<b>1.2</b>	<b>4.6</b>	<b>.8</b>

<sup>1</sup> Includes the six counties of Northern Ireland. <sup>2</sup> Includes 38,052 head to Belgium.

Carcasses from fat cattle, mostly steers, are exported to the United Kingdom. Because of the price guarantee under the Irish-British agreement, the United Kingdom has been and is likely to continue to be the best market for Irish beef from fat cattle. Reportedly, about 95 percent of the beef carcasses from fat steers slaughtered in Ireland qualify for the guaranteed price in accordance with U.K. specifications for this type of beef.

**Pork.**—Exports of pork were 83.6 million pounds in 1968, compared with 59.1 million in 1967 (table 8). Prior to 1968, Ireland's exports of fresh pork declined considerably. Most of the increase in pork exports in 1968 resulted from a recovery in exports of fresh pork to the United Kingdom.

Bacon is the primary pork product exported. Under the U.K. Bacon Agreement, Ireland has a share of the U.K. market. Denmark, which supplies the major portion of U.K. import requirements, is Ireland's major competitor.

**Mutton and Lamb.**—The United Kingdom is also Ireland's major market for mutton and lamb. Supplies of mutton and lamb available limit this trade. In 1967 exports to the United Kingdom totaled 22.7 million pounds of a total 29.6 million. France is the second largest market for fresh mutton and lamb. In 1968 almost 10 million pounds were exported to France, reducing the quantities exported to the United Kingdom to 13.4 million pounds even though total exports were 28.1 million.

## COMPETITION WITH U.S. PRODUCERS

Among all countries that export boneless beef to the United States, Ireland is virtually the only one that ships cow beef almost exclusively. Imports from other countries consist of both steer and cow beef.

Irish beef imported into the United States competes with the domestic cow beef. However, since beef is a versatile product which is used in a wide range of processed foods, Irish boneless cow beef competes with both cow beef and other types of U.S. beef that are used in the same types of products. It is estimated that more than 50



Table 8.—IRELAND: Meat exports by country of destination, annual 1964-68 (product weight)

Commodity and country of destination	1964	1965	1966	1967	1968
<b>Beef and veal:</b>	<i>1,000 pounds</i>	<i>1,000 pounds</i>	<i>1,000 pounds</i>	<i>1,000 pounds</i>	<i>1,000 pounds</i>
Fresh or chilled:					
United Kingdom . . . . .	38,205	59,255	84,698	232,521	189,851
Netherlands . . . . .	8,715	12,757	4,377	1,810	165
Italy . . . . .	15,734	4,726	—	1,020	33
France . . . . .	5,425	8,933	7,028	972	159
United States . . . . .	5,997	100	1,110	—	187
Germany, West . . . . .	11,720	10,692	922	—	—
Spain . . . . .	—	2,565	—	—	—
Other countries . . . . .	1,318	759	311	543	39
Total . . . . .	87,114	99,787	98,446	236,866	190,434
Frozen:					
United States . . . . .	15,700	9,406	41,905	76,656	56,149
United Kingdom . . . . .	5,383	4,218	8,367	9,807	<sup>1</sup> 9,777
Sweden . . . . .	2,384	837	—	1,047	1,332
Germany, West . . . . .	1,521	1,976	2,689	—	(2)
Other countries . . . . .	4,141	5,110	2,959	1,843	537
Total . . . . .	29,129	21,547	55,920	89,353	67,795
Canned beef:					
United Kingdom . . . . .	10,037	9,164	9,507	9,497	11,973
Other countries . . . . .	18	40	—	188	268
Total . . . . .	10,055	9,204	9,507	9,685	<sup>3</sup> 12,241
<b>Pork:</b>					
Fresh, chilled, or frozen:					
United Kingdom . . . . .	12,263	37,317	12,478	4,957	<sup>1</sup> 18,449
France . . . . .	3,956	5,706	5,154	1,502	2,337
United States . . . . .	—	1,165	1,787	—	20
Other countries . . . . .	2,827	1,364	389	78	40
Total . . . . .	19,046	45,552	19,808	6,537	20,846
Bacon:					
United Kingdom . . . . .	61,088	58,453	62,171	52,275	<sup>1</sup> 62,125
Other countries . . . . .	205	267	333	264	264
Total . . . . .	61,293	58,720	62,504	52,539	62,389
Ham:					
United Kingdom . . . . .	823	360	315	356	<sup>1</sup> 209
Other countries . . . . .	73	251	170	30	47
Total . . . . .	896	611	485	386	256
Ham, canned:					
United Kingdom . . . . .	50	28	70	266	<sup>1</sup> 129
Other countries . . . . .	2	—	2	9	14
Total . . . . .	52	28	72	275	143
Sausage, not canned:					
United Kingdom . . . . .	470	541	871	782	<sup>1</sup> 457
Other countries . . . . .	135	96	46	20	865
Total . . . . .	605	639	917	802	<sup>4</sup> 1,322
<b>Mutton and lamb:</b>					
Fresh, chilled or frozen:					
United Kingdom . . . . .	20,711	20,752	26,630	22,679	<sup>1</sup> 13,401
France . . . . .	6,937	4,730	5,125	2,615	9,745
Belgium and Luxembourg . . . . .	2,437	2,742	3,429	2,468	3,511
Netherlands . . . . .	1,034	—	2,000	1,563	955
Other countries . . . . .	1,885	3,165	1,260	272	459
Total . . . . .	33,004	31,389	38,444	29,597	28,071

See footnotes at end of table.

Table 8.—Continued

Commodity and country of destination	1964	1965	1966	1967	1968
	<i>1,000 pounds</i>	<i>1,000 pounds</i>	<i>1,000 pounds</i>	<i>1,000 pounds</i>	<i>1,000 pounds</i>
Other meat, canned:					
United Kingdom . . . . .	2,876	2,498	3,029	2,837	—
Other countries . . . . .	89	—	—	—	—
Total . . . . .	2,965	2,498	3,029	2,837	—
Meat preparations, n.e.s.:					
United Kingdom . . . . .	3,284	2,751	3,742	4,011	<sup>1</sup> 4,648
Other countries . . . . .	57	35	186	68	56
Total . . . . .	3,341	2,786	3,928	4,079	4,704

<sup>1</sup> Includes the six counties of Northern Ireland.<sup>2</sup> Less than 500 pounds.<sup>3</sup> Includes stewed steak, corned beef, and other prepared or preserved beef.<sup>4</sup> Includes pork and beef sausages.

Source: Prepared on the basis of official statistics of the Irish Ministry of Agriculture and reports of the U.S. Agricultural Attaché in Dublin.

percent of U.S. beef production is utilized in processed products, including ground meat, stew meat, luncheon meats, sausages, canned meats, canned meat and vegetable mixtures, and TV dinners.

U.S. imports of beef from Ireland totaled 56.7 million pounds in 1968, compared with 80.6 million in 1967, and a 1961-65 average of 47.3 million (table 9). Irish exports to the United States in 1967 were abnormally large as a result of the carryover of cull cows from the 1966 season for slaughter in 1967. Shipments in 1968 were near normal, with the United States receiving about 75 percent of Irish exports of boneless beef.

Most of the increase in Irish beef production over the next few years is expected to result from a greater turnoff of fat cattle. Any expansion in the basic cow herd and the supply of cow beef for the U.S. market will be somewhat less than the increase in beef production from fat cattle for the United Kingdom.

Table 9.—IRELAND: U.S. imports of meat from Ireland, average 1961-65, annual 1964-68

Commodity	Average 1961-65	1964	1965	1966	1967	1968
	<i>1,000 pounds</i>	<i>1,000 pounds</i>	<i>1,000 pounds</i>	<i>1,000 pounds</i>	<i>1,000 pounds</i>	<i>1,000 pounds</i>
Beef and veal:						
Fresh, chilled, or frozen . . . . .	99	—	—	4	43	384
Boneless beef . . . . .	46,306	19,687	7,824	38,388	80,567	56,287
Pork:						
Fresh, chilled, or frozen . . . . .	1,015	37	1,973	1,400	7	155
Hams, shoulder and bacon . . . . .	112	126	177	179	159	165
Pork, other . . . . .	—	—	14	—	—	—
Lamb, fresh, chilled, or frozen . . . . .	14	—	—	—	—	—
Mutton, fresh, chilled, or frozen . . . . .	24	—	—	—	—	—
Other meats, canned or preserved . . . . .	802	376	1	28	20	5

Source: Compiled from official records of the U.S. Department of Commerce.

Ireland, along with other suppliers, voluntarily agreed to limit its exports of fresh, chilled, and frozen beef, veal, and mutton to the United States during 1968. These commitments were made late in the year when it became apparent that without voluntary commitments by the supplying countries, U.S. import quotas would be imposed under the 1964 Import Law. Similar voluntary commitments have been made by Ireland and the other suppliers with respect to exports to the United States during 1969.

There is no evidence that the voluntary commitments on Irish exports to the United States have placed any apparent hardship on Irish exporters as the available supplies of cow beef for the U.S. market and the Irish commitments have been approximately the same. This assumption is based on the belief that Irish exports were at a normal level in 1968 and that actual export restrictions on shipments to the United States were not necessary in 1968. Also, the expansion in the U.S. market for beef is likely to continue to be at least proportionally equal to the increase in Ireland's supplies of cow beef.

U.S. imports of pork from Ireland totaled 320,000 pounds in 1968, compared with 166,000 pounds in 1967 and an annual average of 1.1 million pounds for the 5 years 1961-65 (table 9). Imports of other Irish meats, mostly canned beef, declined from 376,000 pounds in 1964 to only 5,000 pounds in 1968.

Irish competition with U.S. livestock producers in third countries is insignificant. Most of Ireland's exports move to the United Kingdom and consist of products not generally exported in substantial quantities by the United States. One exception, however, is cattle hides, but Ireland's exports are relatively small.

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